



ENERGY EFFICIENCY WATCH

 **Wuppertal Institute**
for Climate, Environment
and Energy

ECOFYS

sustainable energy for everyone



Results of the NEEAP Screening

Exploring Different Realities in European Energy Efficiency Policy

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EUFORES Workshop
“Implementation of energy
efficiency policies: Market
feedback”

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What has been our task?

Integrating NEEAP analysis and market feedback

■ **Two main steps:**

- 1st step: Screening of all NEEAPs
- 2nd step: Expert survey

■ **Main Products**

- 27 national reports on EE policy progress in each MS
- Survey report

■ **Objectives**

- Highlight strengths and weaknesses of national EE policy/ESD implementation (good practice examples, implementation deficits)
- Identify policy gaps and give policy recommendations

What was the focus of attention?

- **Changed political and economic conditions for EEP**
 - NEEAPs published after economic recession
 - National governments have changed
 - Discussion on EED
- **Three foci of attention**
 - Conducting a reality check: assessing improvement of implementation
 - Quality of governance framework
 - Analyse level of ambition of plans and role of NEEAPs

What was analysed?

Typical contents of a NEEAP

- **Context**
 - ESD requires MS to submit three NEEAPs (2007, 2011, 2014)
 - Guidance provided by EC, but no obligation to use template
- **Typical contents**
 - National energy saving targets for 2010 and 2016 (9%)
 - Calculation of achieved and expected savings
 - Evaluation methods used
 - Policies and measures per sector
 - Reporting on specific ESD requirements: role of public sector, advice and information, contributions from energy companies, market for energy services

Main Impressions

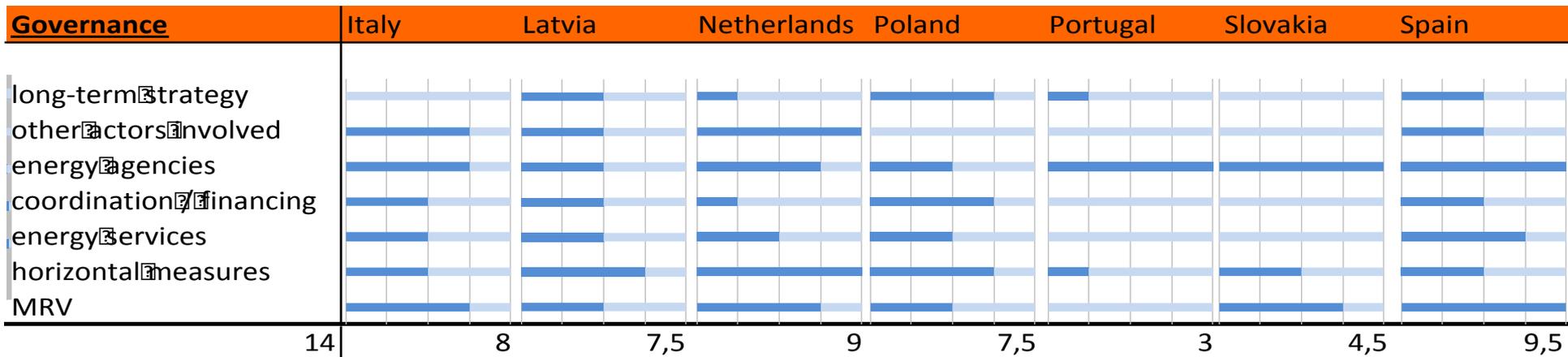
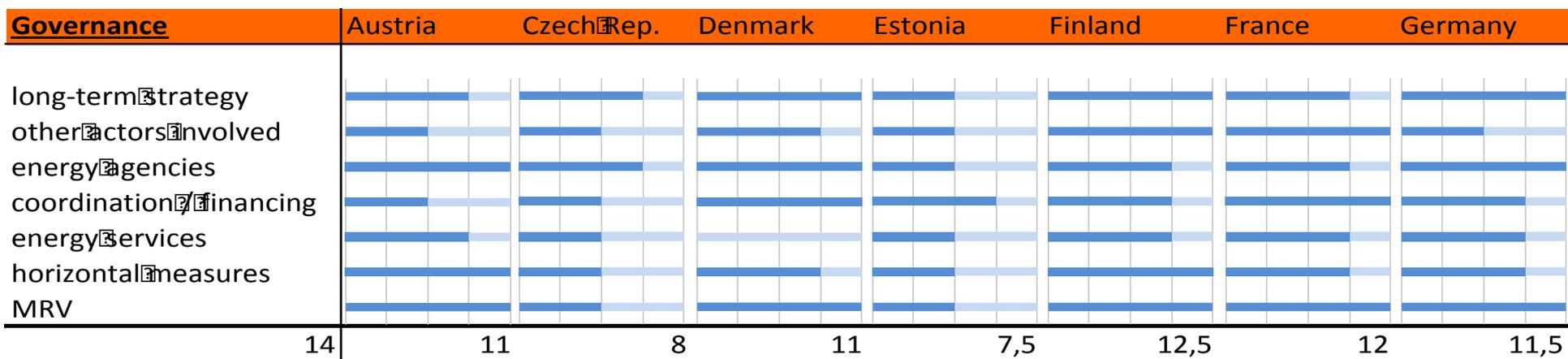
- Large differences in structure, contents, and level of detail (from 14 to >300 pages)
- Sectoral policy packages (e.g. appliances, buildings) of some MS are to a very large extent based on EU legislation
- The majority of MS have not (yet) adopted long term EE strategies and targets (or have mentioned them in NEEAP)
- The economic downturn has had significant consequences on EE policy in several MS (e.g. Greece, Romania)
- Target achievement, if measured with top-down methods, is in many cases also due to economic recession
- Blind spots: transport sector

Main Results

Governance	Austria	Czech Rep.	Denmark	Estonia	Finland	France	Germany	Italy	Latvia	Netherlands	Poland	Portugal	Slovakia	Spain
long-term strategy														
other actors involved														
energy agencies														
coordination / financing														
energy services														
horizontal measures														
MRV														
Public	Austria	Czech Rep.	Denmark	Estonia	Finland	France	Germany	Italy	Latvia	Netherlands	Poland	Portugal	Slovakia	Spain
public sector strategy														
role modal														
mobility management														
public procurement														
public buildings														
adequacy of package														
Buildings	Austria	Czech Rep.	Denmark	Estonia	Finland	France	Germany	Italy	Latvia	Netherlands	Poland	Portugal	Slovakia	Spain
MEPS														
other regulations														
economic incentives														
financing instruments														
EPCs														
advice and audits														
information														
demonstration														
education and training														
adequacy of package														
Appliances	Austria	Czech Rep.	Denmark	Estonia	Finland	France	Germany	Italy	Latvia	Netherlands	Poland	Portugal	Slovakia	Spain
MEPS														
economic incentives														
energy labels														
information tools														
education and training														
adequacy of package														
Industry	Austria	Czech Rep.	Denmark	Estonia	Finland	France	Germany	Italy	Latvia	Netherlands	Poland	Portugal	Slovakia	Spain
standards														
ES&A targets														
obligations														
economic incentives														
tradable permits														
energy taxation														
energy labelling														
other measures														
adequacy of package														
Transport	Austria	Czech Rep.	Denmark	Estonia	Finland	France	Germany	Italy	Latvia	Netherlands	Poland	Portugal	Slovakia	Spain
planning instruments														
regulatory instruments														
economic incentives														
information														
R&D support														
adequacy of package														

Cross-country analysis

Governance Framework

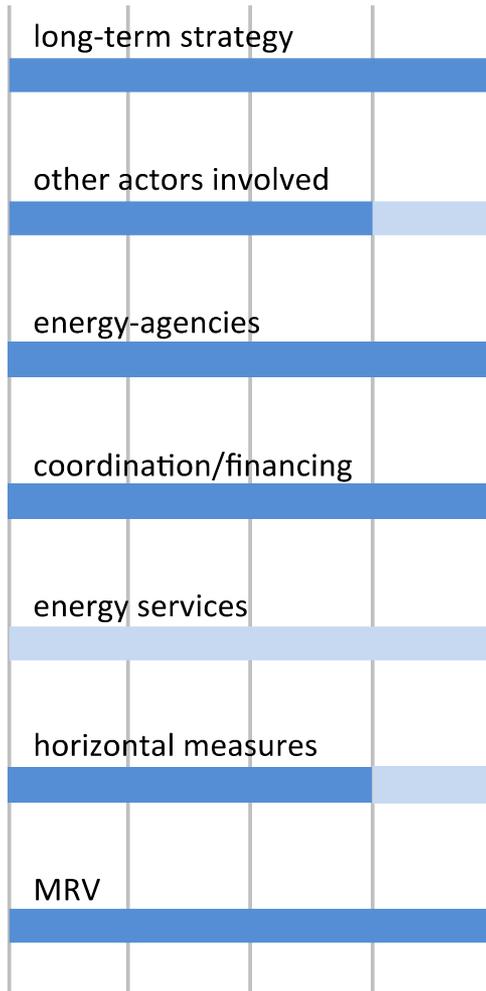


+ Energy agencies widely established

- Framework conditions for energy services mostly weak

Good practice

Governance Framework (Denmark)



- Target and measures to be independent from fossil fuel (2050)
- Energy companies involved via saving obligations
- regions and local authorities involved
- Danish Energy Agency
 - strong link to regional activities
 - coordinating energy saving obligations and energy saving trust
- Agreement on national target and savings obligations
- but: no mention of energy services in NEEAP

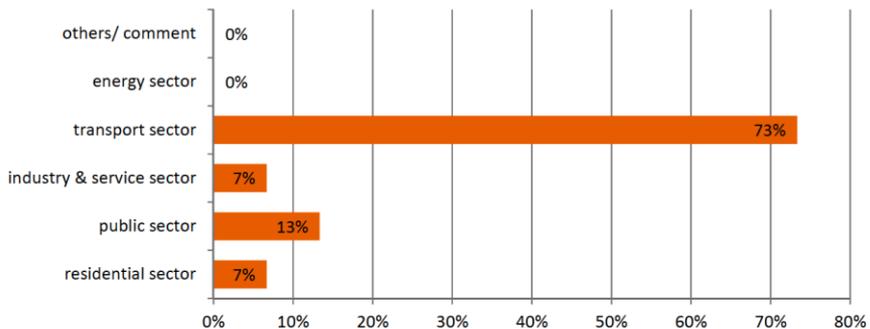
Survey results

Denmark

Denmark: achievement of national energy savings target



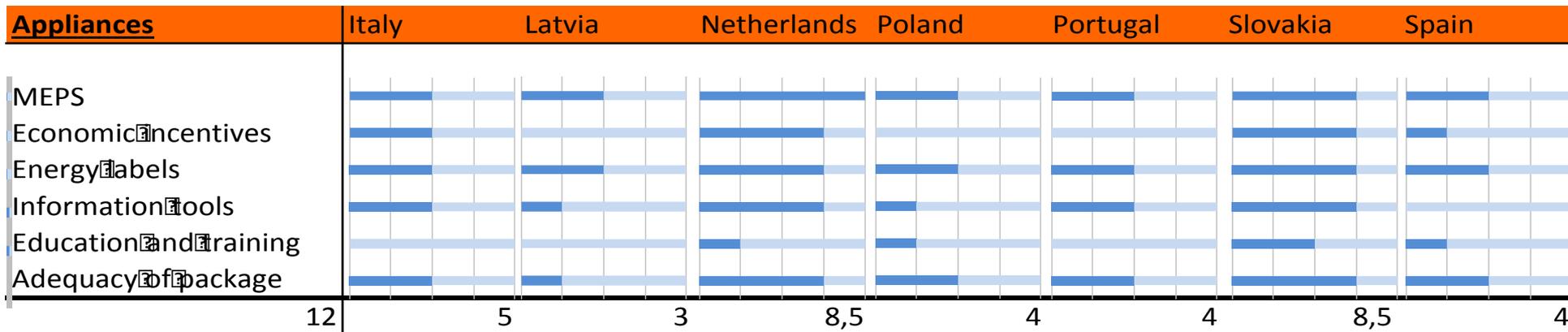
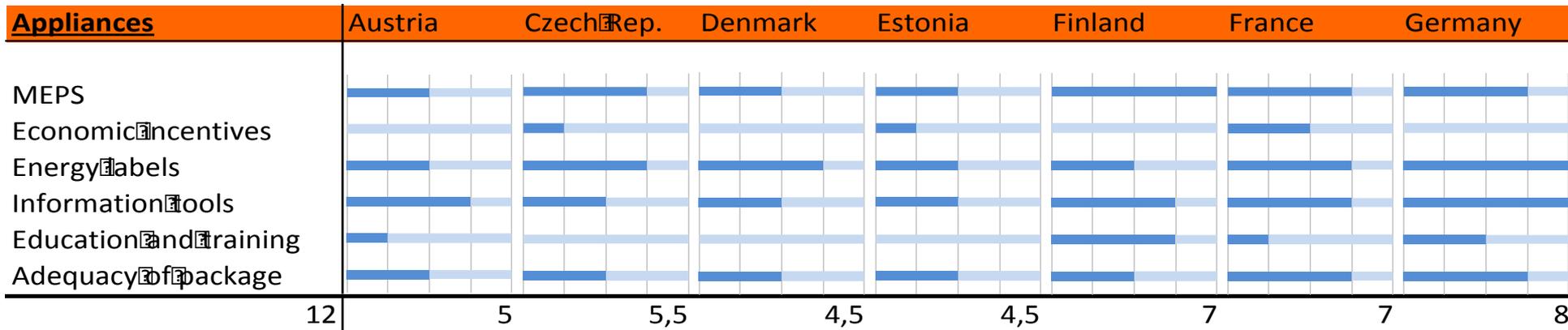
Denmark: the most important gap in energy efficiency policies



- According to the Danish experts, energy efficiency policies have progressed very well since the first NEEAP
- More than 50 % believe that the overall ambition of the energy efficiency policy is generally rather high (highest indicator of all countries).
- Opinions on the progress in the last 3 years are more mixed: a third sees many additional policies, another third only a few additional policies.
- Nearly 80 % believe that the energy efficiency target is very likely to be achieved (second highest indicator of all countries)
- Experts agree that the biggest challenge for Danish policy lies in energy efficiency in the transport sector.

Cross-country analysis

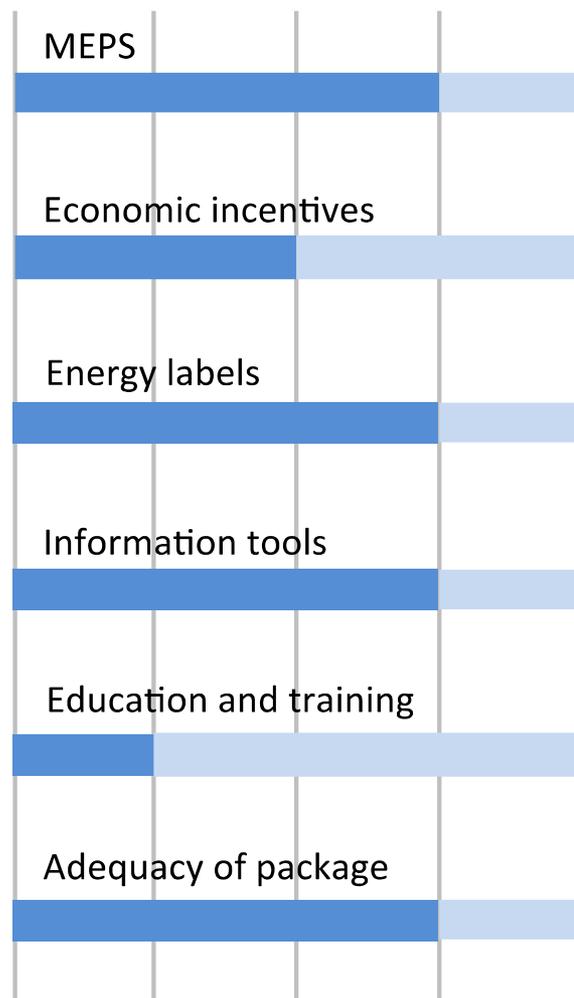
Appliances



- Generally **rather weak**; mainly relying on **EU regulation** (Ecodesign, Label), especially lack of incentives and education & training for retail

Good practice

Appliances (Netherlands)



- Ecodesign Directive implemented, EU Energy Labelling Directive implemented
- Strengthening of Ecodesign and energy label for products
 - information and support activities for designers, manufacturers and buyers
 - controlling/testing
- Energy Investment Allowance and tax rebate programme
- R&D funding scheme
- Information about energy performance and energy savings, installation of smart meters, help desk (MilieuCentraal)
- limited efforts to promote education and training

Conclusions

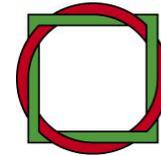
Lessons learned from 2nd round of NEEAPs

- In general, **NEEAPs have improved** (more structured, more comprehensive), but still many have gaps and insufficiently detailed measure descriptions
 - often impossible to assess quality of implementation and effectiveness of policies
 - NEEAP screening cannot replace independent evaluations of strategies, potentials and progress of implementation
 - MURE database as additional source of more in-depth information partly very useful
 - EEW market feedback provides helpful insight here
- Biggest achievement of NEEAP process (or even of ESD as such): Induced a **comprehensive planning process** for EE policies, addressing the most important sectors and potentials, and monitoring & evaluation of energy savings

Conclusions

Lessons learned from 2nd round of NEEAPs

- EC's non-binding **template** has guided (most) MS towards using NEEAPs as strategic document, but left freedom to structure plans acc. to MS-specific needs/circumstances
 - No mandatory template needed, but binding requirements to meet quality criteria regarding types and level of detail of information provided (for reporting on overall strategy, individual P&Ms, and evaluation of impacts)
- Good plans are very important but we shouldn't forget that what counts is their **implementation**
 - needs funding & skilled actors (both on EE markets and in policy implementation)
 - increase share of structural funds dedicated to energy efficiency as a „green economic recovery programme“ to support Member States affected by economic downturn?



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Many thanks for your attention!

See also: www.energy-efficiency-watch.org



For further information
please visit our website:

www.wupperinst.org